

Creating a Medicaid/OPTUM Client Group Enrollment

This guidance is to set up the Client Group Enrollment, which will enable you to release encounters.

1. **Getting here:** Login, on the Navigation Pane (left menu) select **Client List** and search for your client. Select **Profile**.
2. Select **Client Group Enrollment** from the navigation pane.

The image shows two screenshots of the Idaho-WITS Training system interface. The top screenshot is the 'Client Search' page, and the bottom screenshot is the 'Client Profile for Rabbit, Jessica' page. Both pages have a navigation pane on the left and a header with user information and a 'Printable View' link.

Client Search Page:

- Header: Idaho-WITS Training, User: Bastin, Crystal, Loc: Provider Training Agency, Treatment Location 1, Client: Rabbit, Jessica | 10604181000010E, Printable View
- Navigation Pane: Home Page, Agency, Group List, Clinical Dashboard, Client List (selected), Client Profile, Fee Determination, Gain Short Screener, Eligibility Screener, Benefit Application, Linked Consents, Non-Episode Contact, Activity List, Episode List, System Administration, My Settings, Reports, Support Ticket
- Search Form: Agency (Provider Training Agency), First Name (j*), SSN, Idaho-WITS Training Client Id, Unique Client Number, Treatment Staff, Case Status (All Clients), Other Number, Include Only Active Consents (Yes), Facility, Last Name (rabbit), DOB, Provider Client ID, Primary Care Staff, Intake Staff, Number Type.
- Client List Table (Export):

Unique Client #	Full Name	DOB	SSN	Gender	Actions
10604181000010E	Rabbit, Jessica	6/4/1981	000-00-0000	Male	Profile Activity List Delete Record Linked Consents

Client Profile for Rabbit, Jessica Page:

- Header: Idaho-WITS Training, User: Bastin, Crystal, Loc: Provider Training Agency, Treatment Location 1, Client: Rabbit, Jessica | 10604181000010E, Generate Report, Printable View
- Navigation Pane: Home Page, Agency, Group List, Clinical Dashboard, Client List, Client Profile (selected), Alternate Names, Additional Information, Military Information, Contact Info, Collateral/Cust. Contacts, Other Numbers, History, Client Group Enrollment
- Form Fields: First Name (Jessica), Middle Name, Last Name (Rabbit), Gender (Male), DOB (6/4/1981), SSN (000-00-0000), Provider Client ID, Unique Client Number (10604181000010E), State Client ID, Record Created By (Willingham, Robert, WA), Last Updated By (Bastin, Crystal), Created Date (3/21/2014 5:37 PM), Last Updated Date (6/30/2014 3:29 PM), s License, Access Category.

3. Select **Add Benefit Plan Enrollment**.
4. Select Medicaid for the **Payor-Type** and Medicaid – OPTUM-Medicaid for the **Plan-Group**.

5. Select No for **Is the client enrolled in Healthy Connections?**

NOTE: Selecting “Yes” will require you to enter an end date.

6. Enter the **Coverage Start** date.
7. Select Self for **Relationship to Subscriber/Responsible Party**.

NOTE: This will auto-populate the Subscriber/Responsible Party information.

8. Select **Save**.

The screenshot shows the MedlinePlus web interface. At the top right, the MedlinePlus logo and version 15.10.0 are visible, along with a Logout button. Below the header, there are two tabs: "Add Benefit Plan Enrollment" (selected) and "Add Government Contract Enrollment". A table with columns "Subscriber/ Resp Party", "Start Date", "End Date", and "Actions" is shown. A red circle with the number 3 points to the "Add Benefit Plan Enrollment" tab. Below the table, the "Benefit Plan/Private Pay Billing Information" section is displayed. It contains several fields: "Payor-Type" (Medicaid), "Plan-Group" (Medicaid - OPTUM-Medicaid), "Is the client enrolled in Healthy Connections?" (No), "Payor Priority Order" (1), "Coverage Start" (6/1/2014), "End" (empty), "Payor" (empty), "Eligibility Category" (empty), and "Relationship to Subscriber/ Responsible Party" (Self). A red circle with the number 4 points to the "Benefit Plan/Private Pay Billing Information" section header. A red circle with the number 5 points to the "Payor" field. A red circle with the number 6 points to the "Coverage Start" field. A red circle with the number 7 points to the "Relationship to Subscriber/ Responsible Party" field. Below these fields, the "Subscriber/ Responsible Party" section is shown, containing fields for "First Name" (Jessica), "Middle" (empty), "Last Name" (Rabbit), "Birthdate" (6/4/1981), "Gender" (Male), "Address" (1450 W. State Street), "City" (Boise), "State" (Idaho), and "Zip" (83702). A red circle with the number 8 points to the "Save" button at the bottom right of the form. The "Cancel" button is also visible next to the "Save" button.